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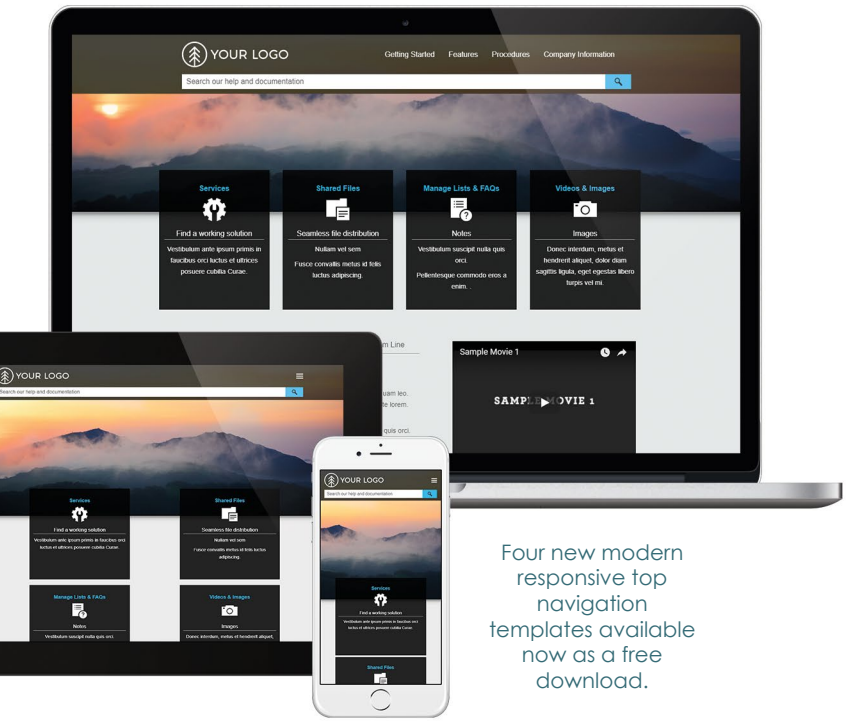

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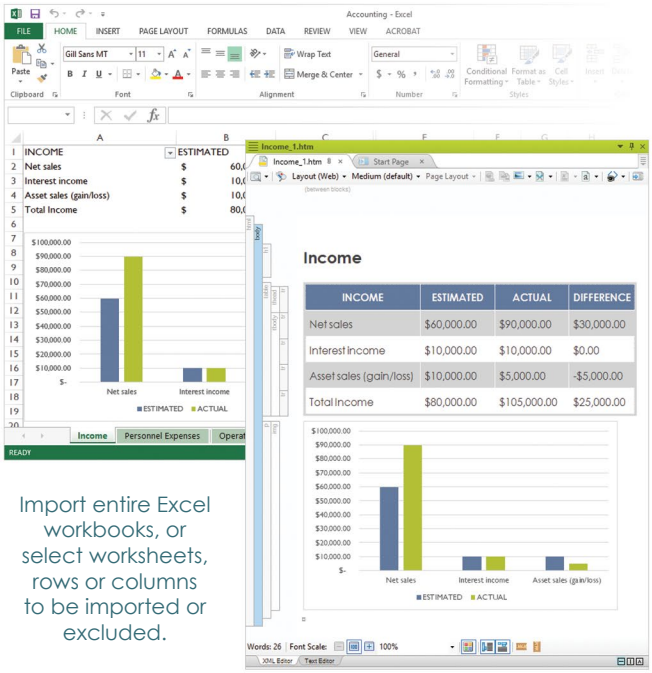
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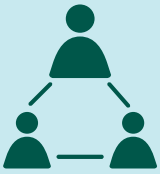

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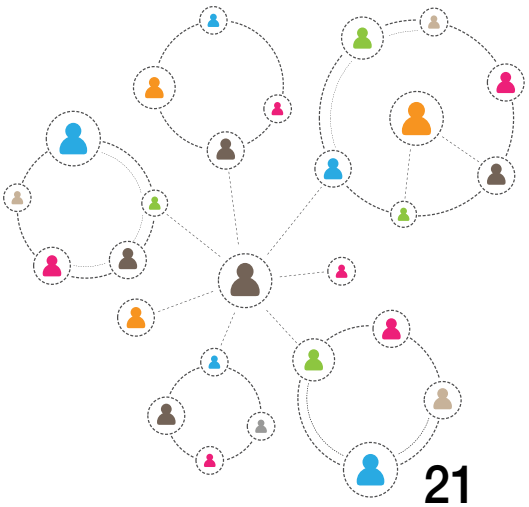

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A Note from the Editor

ANDREA AMES HAS guest edited an outstanding issue of *Intercom* for September on a much-needed topic—the business value of content. In the issue, she and six other authors show how content is crucial to business, especially in the era of Information and Industry 4.0, where information is an integral part of emerging technology.

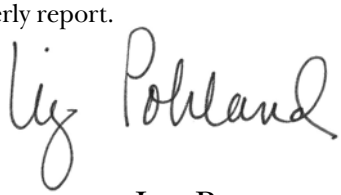
Drawing from both the technical and marketing sides of her brain, Andrea speaks and teaches about how organizations can best leverage technical content to grow revenue, acquire and retain customers, and create raving fans from those customers. She also inspires technical content strategists, designers, and creators to build skills and capabilities for measurable impact in their organizations.

Recognized in 2016 by MindTouch as one of the Top 25 Content Strategy Influencers, and in 2017 by [A] as one of the Top 25 Masters of Multichannel, Andrea is a content experience strategist and founder and CEO of Idyll Point Group. Idyll Point Group assists executives and managers to build content organizations that have measurable business impact and provides content strategists with apprenticeship-style coaching to develop the skills to lead businesses in content strategy.

Andrea is a Certified Online Training Professional and the curriculum designer and Program Chair for the UCSC Extension in Silicon Valley certificate program in technical writing and communication, where she teaches content design and architecture, human factors, and usability courses. She is also a Fellow and past President of STC, a Distinguished Engineer of the ACM (the first content professional to achieve this distinction), a Senior Member of the IEEE, and a member of numerous other professional associations.

When she's not advising content leaders or teaching technical writers, Andrea teaches quilt making and design, kayaks, SCUBA dives, and walks her dogs—typically while binging on podcasts and audio books. You can reach Andrea on Twitter @aames, LinkedIn at *https://www.linkedin.com/in/andreaames/*, or her website: *www.IdyllPointGroup.com*.

Thank you to Andrea, Melissa Breker, Colleen Jones, Saul Carliner, Jenifer Schlotfeldt, Joe Gollner, and Jack Molisani for sharing their expertise and thoughts with *Intercom* readers. Thanks also go to the the columnists who wrote columns on Ethics and Accessibility within this issue and a My Job by Linda Oestreich. Be sure to read the Society Pages for some exciting news for the 2018 membership year, including 65th anniversary rates on dues and new benefits, as well as President Alyssa Fox's quarterly report.



—Liz Pohland
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From the Guest Editor

I AM THRILLED to be a part of this special issue of *Intercom* celebrating the business value of content. Content is crucial to business—and business is finally warming up to this idea. The recent boom in content marketing and content strategy and end-to-end customer experience, the focus on metrics and analytics, and discussions of the vision of content in the age of artificial intelligence, bots, and the unknown industry trends of the future all bode well for content's heyday.

The big question, in my mind, for technical communicators is this: Are you ready to seize this opportunity? Are you ready to stretch, reposition yourself, take on new challenges and responsibilities, remain teachable and flexible, and embrace the ambiguity enough to drive the future of content in business?

I am currently reading *Killing Marketing* by Joe Pulizzi and Robert Rose. In it, these veteran content marketing thought leaders take apart their own field, dissect its history, and examine the relevance of its existing approaches. They look at where marketing is going, the new trend in brand-owned media, and they see marketing organizations that are paying for themselves—sometimes several times over.

I see technical communication once again on the cusp of a massive change. Those who can create opportunity from challenges, be clearly relevant to their customers, rapidly experiment and course correct, and drive change will be most successful. As the articles in this special issue show, there are many ways to drive the thinking needed to keep technical content valuable in the business equation and to demonstrate the necessity of highly skilled technical communicators in designing and creating these valuable business assets.

In "Aim and THEN Fire: The Business Value of Content Strategy," Melissa Breker presents an argument for the value of content strategy. An end-to-end content strategy is the foundation on which your entire house of content should be built—from marketing awareness content all the way through to technical, issue-resolution content and everything in between. Melissa describes how important it is to build your foundation first!

Once you have a strategy, and before you start implementing it, you need to have a system in place for measuring your success. Colleen Jones lays out a framework for content metrics that will give you a starting point for creating your own end-to-end content metrics plan as part of your content strategy in "Uncover the Value of Content to Modern Business with a Fresh Approach to Metrics."

Next, exploring the value of technical content in the context of the end-to-end customer experience, I present some suggestions in "Content Marketing: The Straightest Line between Content and Customer" for how we can show up in a valuable way to our marketing teams—and maybe even get some acknowledgment for directly driving revenue!

In "Client Service: The Essence of the Technical Communication Business," Saul Carliner makes a compelling case for technical communicators in services and support. He provides so much actionable information that it is a blueprint for making your mark in this era of high-value client care.

Demonstrating how some of these concepts work in practice, Jenifer

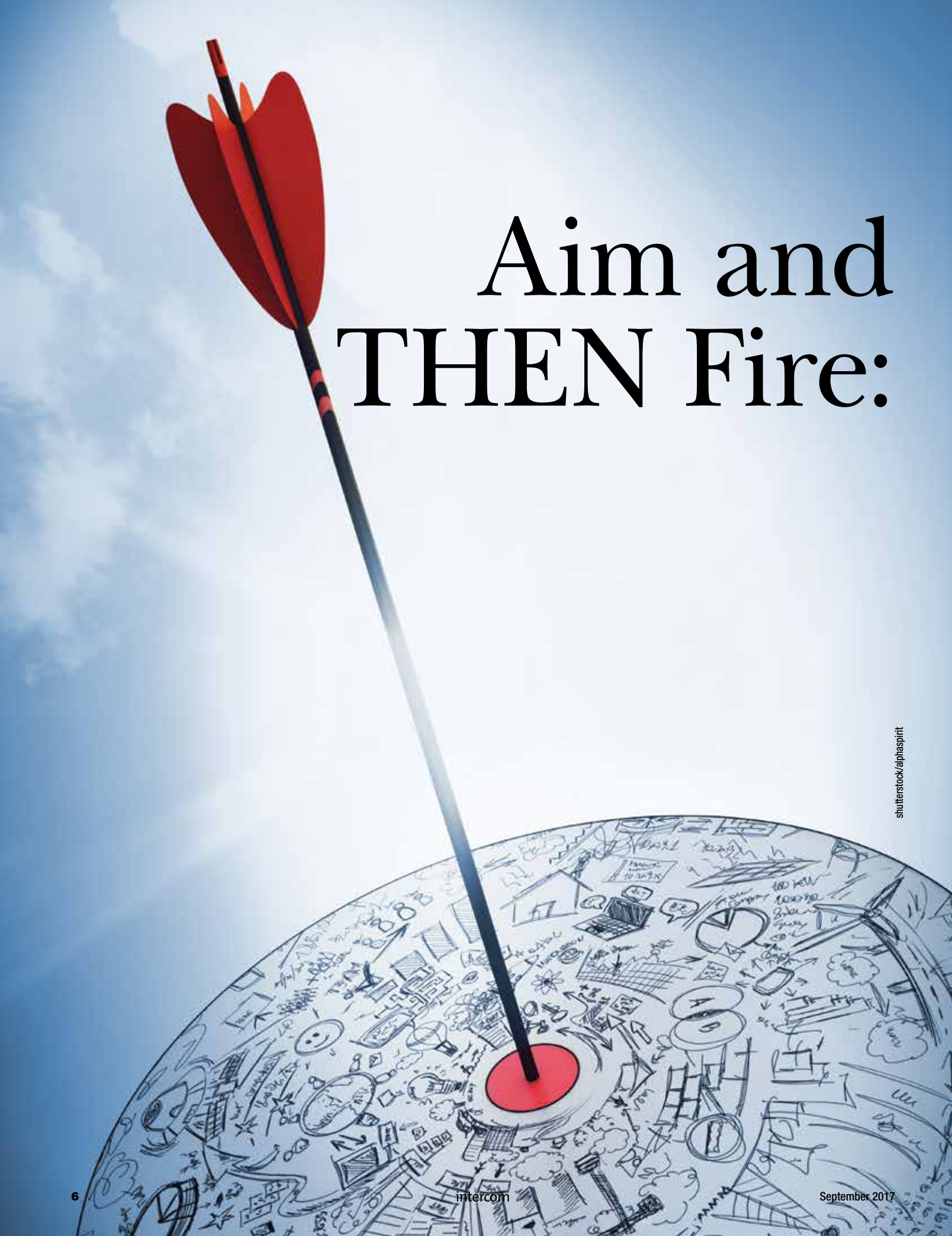
Schlotfeldt presents "IBM Bluemix Case Study: Driving Customer Acquisition and Retention with Technical Product Content." Working with other product-development functions, her content team was able to add measurable value to a part of the content experience typically owned by marketing.

Finally, Joe Gollner and Jack Molisani give us a wonderful peek into the future in "The Human Face of Content 4.0." In this age of thinking machines, what is in store for us as technical communicators? Between Joe's research and Jack's reach across our industry, they provide a vision of what's to come.

I encourage you to dive into this issue, read and contemplate the implications, and reach out to the authors for more conversation. I look forward to seeing you in our wildly successful future, where technical content is prized highly and we, the amazing humans who create that content, are sought after for the skills, drive, and thought leadership that we bring to the table—the skills that enable our companies and clients to craft stories and experiences for their customers that bring them wild success! Enjoy!

—Andrea L. Ames
andrea@idyllpointllc.com

Aim and THEN Fire:



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The Business Value of Content Strategy

By MELISSA BREKER

WHEN IT COMES TO CONTENT, organizations often understand that *something isn't working*, but they may not fully understand how complex it is to create, manage, and maintain content.

They often have outdated beliefs around how much work it will be to create a plan and to implement it. Some businesses believe that it will result in more work or that it will be one of those "flash in the pan" approaches to change.

Yes, every business is different. Every organization has different content needs based on audiences, current resources, and stage of content maturity. But identifying the business value of content strategy can be a great first step to help create a larger vision for content, and to start bringing people together to generate results.

Aligning People through Vision

From the creative team to the content team, getting everyone on the same page can seem like an impossible task. With multiple roles, opinions, and requirements, it can be hard to align activities, people, and processes. In fact, it can seem hard to know where to start!

As technical communicators, we see different opportunities for sharing the right information. Just as you converge ideas to communicate value to external customers, your role is perfectly positioned to communicate the business value of content strategy.

Content Strategy for the Win

Collaborating with different roles through a targeted content strategy approach can help you bridge the gap between and across different stakeholders, so you know where you are today and where you need to head tomorrow. More importantly, having a clear strategy serves as your guide, your map for getting there.

Content strategy can ensure you know where you're aiming, before you fire.

The Challenges of Content Strategy

You wouldn't get in your car and drive without knowing your final destination. Would you?

The reality is, when it comes to content, many organizations follow a "rinse and repeat" process. They are so busy creating content they neglect to:

- Understand user needs to create a targeted experience though content
- Realize that they talk about themselves too much
- Appropriately estimate the cost associated with poor quality content (loss of reputation, customer complaints)
- Recognize the governance and people aspects of content

It's not just about the content. It's about how you strategically think and plan for the entire content ecosystem.

Setting a Content Strategy Map

The truth is, the perceived value of content strategy is dependent on the lens you use to assess it.

For example, an executive may consider how a particular strategy supports a specific program to meet its goals; from a marketers' perspective, it supports a more consistent brand experience; and for a Web team, it allows for better alignment across different channels and standards.

Different roles have different values and content priorities.

By taking a more comprehensive view and approach through a content strategy, your organization can improve all aspects of content, including the internal costs of content creation, such as:

- Knowledge and transparency for content projects
- Process, systems, and governance to create better workflows
- Skill development and implementation to improve approach and output
- Reduced duplicate or conflicting content and reduced costs from redundant work

- Identification of content gaps and improved existing content to enhance visibility
- Challenges to assertions and assumptions, and identification of faulty logic about content needs
- Ensuring creation of useful and usable content

And the external experience your customers have with your content, such as:

- Improve findability of existing content
- Support a defined customer experience through a customer journey
- Motivate customers through the buying process
- Ensure all content has a targeted audience and goal
- Allow for greater clarity around user focus

And some improvements that cut *both* ways—internal and external—including:

- Thinking about user experience in a unified way (both internally and externally)
- Creating and maintaining better relationships and building trust
- Identifying other options or outcomes, or exploring the consequences of a specific course of action

One way to drive success for your content strategy project is to get management involved early in the process. The "show, don't tell" approach demonstrates management's long-term commitment to content and paves the way for project success.

When looking at the people responsible for creating content, here are some questions to consider:

- Does the team know what effective, strategic content looks like and how to create it?
- Do they understand why the new content framework is important, and how it will improve the content and their working environment?
- Do they have the knowledge and skills to deliver to strategic standards?
- Do they have the processes, tools, and training needed to complete the work?
- Is there a system in place to ensure that people don't slip back into old habits?

You need to make sure the answer to each of these questions is "yes."

Content strategy isn't confined to a specific project or campaign. It impacts not only the kind of content you create, but also how you create it, how you distribute it, who's involved, and the tools your team uses to improve consistency and efficiency for all content across the organization.

By adopting a strategic approach to content, you can better prepare for risks and benefits to cross the line to execution. And as a technical communicator, you're already doing the work! So why not approach content in an integrated way and create a longer-term vision for your content, so you can stay focused on your most valuable contributions and successfully measure the impact of your work?

Get Ready for Change

Yes, strategic content is challenging, but not impossible.

When people understand and take ownership of both the *why* (purpose, meaning, and value) and the *what* (tools, structure, and requirements) of content, then transformation across the organization occurs.

So, before you sit down to respond to that next reactionary content request, consider how you might change your approach to content. How can you start to get the right people and processes in place and side-step the politics? How can you put a content strategy in place to set standards and get content done right?

Perhaps start by asking, "How does this content fit into our strategy?" It might seem like an innocent question, but it can expose a lot of gaps and start an important conversation with the content stakeholders in your company.

MELISSA BREKER *is the Founder of Breker Group. With over 15 years of experience leading marketing, content strategy, and social media projects for agencies and large corporations, Melissa loves to make a difference through content strategy and governance. She has worked in multiple industries with large and entrepreneurial organizations to tie business goals and audience requirements together to create measurable results. She works with creative agencies, customer experience teams, product developers, and marketing strategists to inspire and evolve teams to generate results. From technology to government and non-profit organizations, Melissa takes a collaborative, systematic, thoughtful, and analytical approach to the projects that she completes. As a content consultant, speaker and teacher, she's developed courses for the University of British Columbia, Langara College, Content Marketing Institute, and MarketingProfs. Melissa is passionate about helping teams deliver results through consulting, training, and workshops.*

Uncover the Value of Content to Modern Business with a Fresh Approach to Metrics

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By COLLEEN JONES

BUSINESS TODAY IS digital, so content is critical. More than half of the Fortune 500 have disappeared since the year 2000 because they struggled with digital transformation—in other words, they could not adapt their business successfully for the digital era. Businesses are recognizing the importance of changing their approach to information and content. International Data Corporation (IDC) estimates that by 2019, businesses will spend $2 trillion on digital transformation, and 25 percent of that will focus on information transformation.

Companies measure what they value, so as they start to recognize the increased importance of information and content to their digital businesses, companies will want to measure it. What does this mean for you? A big opportunity to:

- Gain more insight about your content's effectiveness, which can help you make it more impactful.
- Position your content as the lifeblood of digital business, either overall or for a specific function such as support.
- Connect your content to impact on other phases of the customer experience, such as marketing and sales.

So how do you take advantage of this opportunity? My answer might surprise you. After advising a range of midsize, large, and enterprise companies as well as conducting independent research with Content Science, I find the answer does not start with the metrics or the data. The answer starts instead with a fresh approach inspired by business intelligence. I like to call this approach content intelligence. Let's walk through a framework and its implications so you can start to identify and track the right metrics for your content.

The Content Intelligence Framework

Content intelligence represents the systems and software that transform content data and business data into actionable insights for content strategy and tactics with impact.

As you can see in Figure 1, key elements of this system are collecting appropriate data from a variety of sources, analyzing that data in light of your content goals, and finally interpreting and acting on that data to understand effectiveness, return on investment, and more.

This framework requires a number of changes to how many companies tackle measuring content. I want to cover two changes that will be especially helpful to you.

Mindset Shift: From Quality to Effectiveness and ROI

In Content Science's research with nearly 200 content professionals—including professionals in technical writing or editing roles—we found that the majority

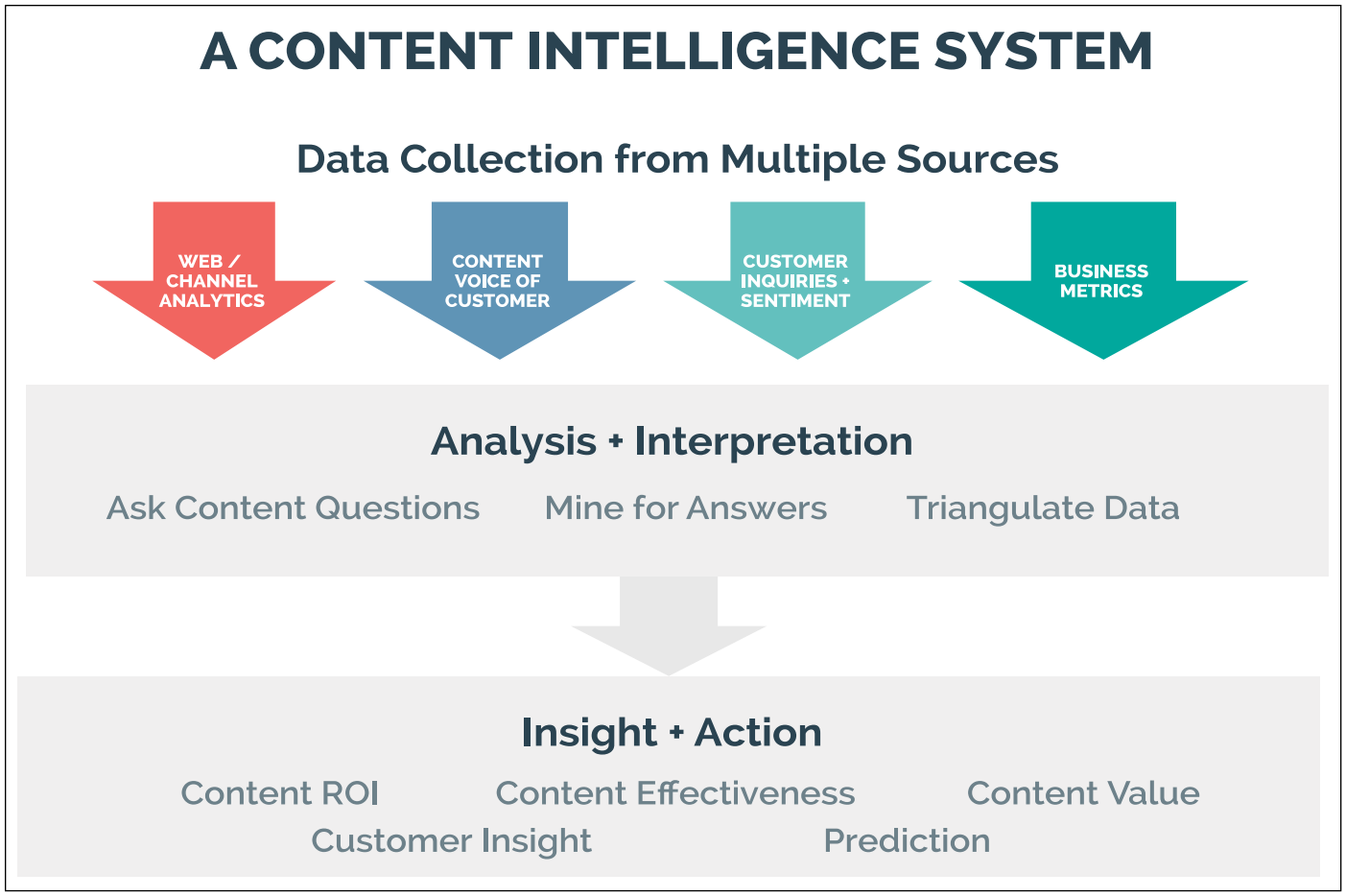

Figure 1. A framework for a content intelligence system

reported measuring content in terms of metrics related to quality, such as volume (number of content products completed), timeliness, delivery completion, defects, or revisions required.

However, the professionals who reported that their content teams or efforts were thriving also reported that they measured content in terms of effectiveness, such as impact on customer behavior or perceptions and business goals, and ROI.

In reviewing open text responses and conducting follow-up interviews, we learned that teams focused on content effectiveness and ROI created a positive cycle, or upward spiral, where metrics informed better content decisions and more ambitious content goals, leading in turn to more success. Ann Marie Gray of Morningstar Financial explains,

"You should always be raising the bar for yourself. Nowadays everything has become so data-driven, which allows us to see what's working, what content is driving results—but the value of that is what you do with it."

What you do with your data or metrics leads to our next change: process.

Process Shift: Start with Questions and End with Decisions

If you're not a data guru or a numbers fan, then I have good news for you. You don't have to be either to plan your approach to content metrics. In fact, my friend and data guru, who also is the vice president of audience development and analytics at CNN, recommends starting with questions:

> *Going through the data mining process and asking the right questions is the hardest part. With seemingly unlimited data and finite time, narrowing the scope to yield meaningful answers is critical.*

You do love numbers? Starting with questions will save you a tremendous amount of time and hassle instead of wading through a sea of data. Once you decide on the questions, you can then focus on which data sources—and ultimately metrics—will help you get answers.

You will want to cover basic questions, such as "Does our support content help customers with problems get resolution? How quickly?" You can then look at a range of data, as suggested in Figure 1, with a focus on answering those questions and decide which metrics give the best indication of answers.

You also have the opportunity to ask questions to help unveil the full value of your content, such as "Do customers use our support content as they shop or buy? Does the content accelerate the shopping or buying process?"

So, the process needs to start with asking the right questions. How does it end? Ideally, with a decision. Don't get stuck in analysis paralysis. If you collect data and never take time to interpret what it means and act on it, you might as well have no data at all. Most commonly, you will

3 LEVELS OF EVALUATING CONTENT

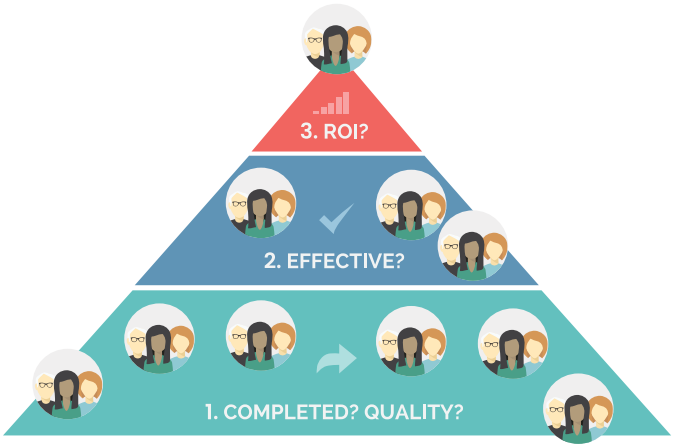

Figure 2. Fewer content teams extend measurement to effectiveness and ROI metrics, but those teams are more successful.

decide either to continue as is, to optimize performance, to predict the impact of a decision, or to investigate a problem or opportunity.

As you pioneer this new world of digital business mediated by content, make the most of your opportunity to gain new insight and show return on investment with content intelligence.

COLLEEN JONES *is the Founder and CEO of Content Science (*content-science.com*), a growing content intelligence and strategy company based in Atlanta, GA. Content Science owns the online magazine* Content Science Review*, Content Science Academy, and the content effectiveness software ContentWRX. A Star Wars fan, Colleen shares insights about mastering the content force at events around the world and in highly rated books, such as* Clout: The Art and Science of Influential Web Content. *Follow Colleen on Twitter at* @leenjones *or on LinkedIn at* www.linkedin.com/in/leenjones.

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Content Marketing: The Straightest Line BETWEEN Content and Customer

By ANDREA L. AMES | *Fellow*

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WHY AN ARTICLE ABOUT MARKETING in a magazine for technical communicators? Because we, my friends, are the future of marketing. And now you're thinking, "Whaaaat?" Yes, it's a controversial idea, but I believe it's true. Here's why.

The Marketing Story

Over the past decade or so, as businesses have become increasingly digital, the sales and marketing approaches of those businesses have been forced to change and evolve. Marketing programs have become digital. Internet, or online, marketing has seen double-digit growth since 2012, according to the CMO Survey (2017), with Forbes saying there's no sign of that growth slowing through 2021 (VanBoskirk 2017).

As our companies transact businesses through more digital means, we are more and better able to track our customers through nearly every interaction with us. This journey, or experience, has become a holy grail of digital business. You've likely seen a representation of this journey, for example (see Figure 1).

The Content Story

Over that same 10 years, as our businesses become more digital, we have seen first-hand the important role that content plays in that evolution. Content has become critical to creating a conversation with customers and potential customers. And content carries more and more

of the relationship with our customers during their entire experience with us.

Content + marketing = content marketing

In 2001, Joe Pulizzi began using the term "content marketing." It has become a widely used marketing approach–some even call it a business model–in the past five to ten years. CMI (Content Marketing Institute) defines content marketing as

> *a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience—and, ultimately, to drive profitable customer action. (Source: "*What Is Content Marketing?*")*

Books, tools, and events around content marketing illustrate its quickly growing popularity.

Figure 1. A general representation of a customer journey

What has any of this got to do with *technical* content? Or me?

If we take a closer look at the journey (see the dark blue phases depicted in Figure 2), we can see how technical content fits it. The value of technical content at the end of the journey—the "use" and "loyalty" phases—is easy to see. "Use," in particular, is our sweet spot, and if we and the design team do our jobs well, "use" can swiftly convert to "loyalty" and perhaps even transform our customers into raving fans.

Marketing often has grand plans for creating those raving fans—references, advocates, call them what you like—and they sometimes treat retweets and other social trivialities like a sign of advocacy. I see a gap in the marketing plan—a gap between "purchase" and "loyalty" that comes from successful product use. And that, technical communicators, is where we can shine!

Figure 2. Where technical content contributes significantly to the customer journey

Other areas are not so apparent. For example, when customers—particularly technology buyers—work through the pre-sales part of the journey, they will spend some time researching and learning about the product and what it can do. They will likely also try the product, especially if it is a complex, expensive technology.

Great technical content that describes how the product will address the customer's needs (benefits) and that can show the customer how to achieve those benefits quickly and easily is pure gold in marketing terms.

Your next actions

All of this assumes that your content is valuable. What does that mean? It must be:

- Relevant to a real customer problem or need
- Aligned with your product strategy and marketing messaging

Sadly, this is not enough. To close the loop between marketing, content, content marketing, and technical content, you must have a relationship with your marketers. Understand the marketing and marketing strategy. Co-develop an end-to-end content strategy. And create your content with their input as an internal customer.

If you can do this, you will elevate your content from telling customers what your product does and how to use it to telling them how it will solve their business needs and why they should buy it. You might even get some credit from driving revenue, acquiring customers, retaining customers, or creating a raving fan or two!

And as marketers realize how valuable post-sales product content can be in their content marketing efforts, your content will become the future of marketing in your company.

See author's bio on page 5.

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Client Service:

The Essence of the Technical Communication Business

By SAUL CARLINER | *STC Fellow*

IN THE THIRD QUARTER 2014 issue of *Technical Communication,* Adnan Qayyum, Juan Carlos, Sanchez Lozano, and I reported on a study that showed that technical communication managers felt that the metric on which they were most closely assessed was not usage analytics, usability test results, or reductions in calls to the help line.

Rather, it was word of mouth about them and their staffs.

In other words, despite decades of work in finding meaningful metrics to demonstrate the value of technical communication, perhaps the most important one is staring us in the face and does not necessarily relate to our work, but the experience of working with us.

In practical terms, this suggests that, although award-winning work is certainly appreciated, as is generating tens of thousands of hits and reducing calls to the help line, what matters most to the organizations that sponsor our work is the day-to-day experience of working with us.

That's why Qayyum, Sanchez Lozano, and I concluded by suggesting that communicators spend less effort on tracking metrics and invest more energy in tracking perceptions of their work.

Although they did so for different reasons, other researchers have essentially reached they the same conclusion. But they go a step further; they suggest focusing on providing outstanding customer service.

In this article, I explain why researchers and other experts are increasingly viewing professional communications as a customer service, then suggest the essential skills of customer service to master, and close by suggesting how to assess the success of your customer service efforts.

Technical Communication Is a Customer Service Business

On the one hand, the technical communication literature emphasizes the important role of writing for users; in the end, people must successfully use the materials we produce to achieve an important goal.

On the other hand, users rarely pay directly for our services. For those of us working externally, clients hire us by the project to produce technical content. For those of us working internally, an internal group hires us: perhaps a product development group, marketing group, technical support team, Information Systems/Information Technology function, or engineering team. This other group authorizes our budgets and the budget transfers that pay our salaries.

This situation is not unique to technical communicators; it is one faced by all professional communicators and instructional designers. As a result, researchers are exploring the nature of customer service in this field. Katzen (2015) defines a service as the "use of knowledge and skills for the benefit of another entity." In our field, we use our knowledge of the art and science of communication to help our clients share important information with a particular audience.

In doing so, we employ the services of others. Most of us are skilled in writing but less so in visual communication, so we often hire illustrators and graphic designers to assist us with high profile projects. Similarly, when the challenges of using an authoring tool exceeds our expertise, we often hire technical experts to help us.

Similarly, we provide services for paying clients who, in turn, have several stakeholders. Typical stakeholders in a client organization include (Carliner, 2000; Robinson & Robinson, 1989):

- Sponsor, the person who can authorize or stop payment on fees for our services but with whom communicators have little interaction
- Ombudsperson, who is the primary contact in the client organization and makes resources available
- Subject Matter Experts, who provide insights about some or all of the material to be communicated

Although the client only succeeds when users can perform the intended goal of the communication product, client needs and priorities usually differ from users'. In fact, advice for dealing with SMEs often focuses on bridging this difference, but usually focuses on the needs of the users, sometimes at the expense of the needs of the SMEs.

When technical communication was almost exclusively a service provided internally, interest in client service was limited. But with the significant expansion of contracting and consulting in the field since the late 1980s, the rise of agency-based work in other branches of Web communication, and the growing realization that even internal workers provide a service, interest in models of customer service has grown in recent years (Kim, 2015). This growing sensitivity to clients also inspired Gonzales, Potts, Hart-Davidson, and McLeod (2016) to redesign a Content Strategy course to incorporate the client perspective. They are hardly alone in this effort.

The Essentials of Technical Communication Services

Although work in the nature of service in technical communication is just beginning, our colleagues in other branches of communication and training have explored this issue. For example, Maclean and Scott (2011) identified a number of skills needed to successfully deliver instructional design services, including project management, client management, planning, leadership, communication skills, teamworking, budgeting, and costing.

In its newest *Competencies for Performance and Learning Professionals,* a list of the essential skills needed by professional instructional designers and trainers, Canada-based Institute for Performance and Learning specifically identified five competencies as essential to excellent customer service. With little modification, these transfer to technical communication.

1. Demonstrating Familiarity with Client Organizations

This competency emphasizes the expectation that communicators demonstrate a strong awareness of the client's

organization and operating context. Specific issues that communicators need to develop awareness of include:

- Mission and vision of the client's organization
- The products and services the client offers, with special knowledge of the product or service on which the communicator works
- Work and decision-making processes in the client's organization
- The work units (departments, functions, divisions) with whom the technical communicator interacts
- The organizational culture of the client organization as well as the work unit with whom the technical communicator regularly interacts

Most significantly, clients expect technical communicators to uncover this information on their own. Clients do not expect to spoon feed it to technical communicators and become frustrated when communicators demonstrate ignorance of much of this. That said, clients do recognize that a new communicator needs time to become familiar with the organization.

2. Supporting Clients in Making Effective Decisions

This competency emphasizes two things: that technical communicators have an obligation to provide well-founded recommendations to client and, at the same time, recognize that the client—not the technical communicator—has final decision making power. This is akin to a doctor providing a patient with excellent medical advice, such as if the patient continues to be overweight, the patient increases their risk of heart disease, but the doctor must recognize that the patient ultimately decides whether or not to continue with their high-fat, high-sugar diet. Specific approaches that technical communicators should take include:

- Suggesting two or more options to consider whenever possible
- Providing sound, research- and practice-based explanations of the pros and cons of each option presented
- Supporting clients with whatever option they choose, as long as doing so does not violate laws or professional ethics, even if the communicator might have made another choice

3. Developing Agreements with Clients

Successful client engagements rest on carefully clarifying and managing the expectations of all parties. This competency focuses on clarifying the expectations of all parties as early as possible, resolving differing expectations before proceeding, and ensuring that the progress of the project matches expectations. Specific issues that technical communicators need to address include:

- Clarifying expectations regarding a project—not tasks and audience, but also the "look and feel" of the type of communication product sought by the client and their role in the process of developing it.
- Uncovering and addressing below-the-surface assumptions about the project
- Gathering information about similar projects in the past, because the best predictor of how the client will behave on a current project is the client's behavior on similar project in the past

Although directly asking clients about expectations and assumptions might seem to be the best approach, most clients are not in the technical communication business and are often unaware of their expectations and assumptions, so asking is only partially helpful. Communicators need to surface these expectations and assumptions to ensure that agreements are more complete and the finished work is most likely to meet client expectations.

4. Managing Changes throughout a Project

Despite great plans, the real success of a project rests on their execution. Although most communicators hope that projects proceed according to plan, that often does not happen.

As Fredrickson (1992) notes, the real success of a project rests not in its going well but in recovering from mishaps that arise. Therefore, project-related communication plays a central role in managing changes: not just written but also interpersonal and organizational.

5. Interacting Effectively with Clients

In fact, interpersonal and organizational communication plays a central role in forming client impressions of technical communicators. This type of communication relies little on our writing skills, which clients assume will be outstanding.

Rather, it focuses on how we engage with clients. Specific skills include (but are not limited to):

- The manner and extent to which we seek input from clients and engage them in the design and development of the materials they commissioned
- The manner in which we explain technical communication matters to clients—clearly and professionally without speaking tech-comm-ease nor coming across as condescending
- The manner in which we manage conflicts with individual stakeholders and among them

Most important to interacting effectively is acting as an ambassador for your group.

Issues in Providing Customer Service in Technical Communication

Katzen (2015) notes that a customer service actually has two parts:

- The finished product of the work
- The act of providing the service

So often, technical communicators primarily focus on the first: the finished product of the work, as well as the drafts that precede it.

But the act of providing the service and all of the interactions that occur within that context also shape perceptions of technical communication.

In other words, a client might receive a report with metrics saying that a new online user assistance system generated a 10% increase in traffic or the number of calls to the helpline shrank by 15%, but might not be impressed because the experience of producing the content that produced these results was so contentious that the client wonders whether the results were worth the cost.

Similarly, if the content fails to produce the intended results as measured by metrics or, more commonly, no one tracks metrics, but the client has a positive experience with the technical communicators and develops a strong trust in their work, the client will have a positive impression of the work.

Tracking the Effectiveness of Customer Service

This is why traditional metrics matter less than perceptions. But how can we measure the effectiveness of providing customer service in technical communication?

If you're thinking "conduct a survey," resist the impulse because the survey will ultimately prove useless.

Certainly one could devise a survey to assess satisfaction. But the data would probably not be trustworthy. First, many of us work for just one or two clients. Although different people work in the client organization, only a few play a central role in choosing to work with us. So the opinions are not equal. Furthermore, recognizing that the population is small and that the results will come back to you (even if a third party conducts the survey), clients have little incentive to provide honest feedback.

So two approaches exist. One is scary but important; the other is probably more reliable but the opportunity rarely arises. Both are necessary.

- **The scary approach.** Meet with the ombudsperson in the client organization to gauge a project. Hold check-in meetings after each major milestone to find out what is working and what's causing concerns. This is scary because it is asking for direct and honest feedback, something many of us actually fear because we're concerned that it's all negative. By asking what's going right, however, the conversation should be more balanced and should provide valuable input on strengthening specific aspects of customer service.
- **The reliable approach.** As I proposed in a third quarter 1997 issue of *Technical Communication,* the most important measure of the technical communication service is assessing client satisfaction or, put more bluntly, whether the client voluntarily chooses to engage you and your group on a future project. For an organization providing a third-party service, you can find out quickly especially if the client hires you for a project soon after the completed one. But because an appropriate project for you and your group might not immediately arise, a proxy measure is whether the client actively refers others to you. (Intention to provide a referral does not count.)

  For an internal technical communication group, that occurs when you receive funding for the next year, because the funding indicates whether the internal clients want to continue working with the staff technical communicators.

In the end, generating ongoing business is our *raison d'etre.* Ideally, reductions in help line calls, user visits to and satisfaction with Web content, and successful grant and business proposals should contribute to positive client impressions. But nothing assesses their impressions more directly than repeat business for external communicators and continued funding for internal ones.

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IBM BLUEMIX CASE STUDY: Driving Customer Acquisition and Retention with Technical Product Content

By JENIFER SCHLOTFELDT

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RECENTLY, MY CONTENT TEAM partnered with our development squad that focuses on product growth to work on one particular initiative to increase customer retention. An important aspect of the growth squad is to facilitate the buyer's journey by focusing on the nurture path. The nurture path typically consists of different touchpoints where you reach out to your customer along their journey from exploring the offering to productively using your product, and ultimately advocating for it.

The content team began by ensuring that the right text was included in emails and in messages delivered within the application, but as we worked together, it was clear that we would be successful only if we had instructional materials to support that text. Those materials would help us to answer the questions we were asking ourselves about how to nurture clients with technical product content:

- What was the customer getting from these messages interrupting their product experience?
- Why would they want to read the emails being sent to them along their journey?

While these might seem like obvious questions, we know from experience that they are often not explicitly asked and answered when taking into consideration the end-to-end content experience.

The answer? What we called a *learning plan*. The job of the learning plan is to enable content teams to deliver a standard set of content assets that are available to help

nurture the user along the path of their journey—or experience—with IBM and IBM Bluemix. We needed to ensure that we had the right content to pull the user into the experience. We wanted the user to be learning and applying their learnings to solve their own business problems. And, ultimately, we wanted the content to enable them to not only get started with our product but also become quickly productive with it.

The Philosophy Behind Our Approach

To further explain the learning plan, I first need to emphasize that I've been using the term *content* up to this point and not *documentation*. Many of the content teams at IBM have pushed to change the culture so that we're looking at the end-to-end content journey. With that mindset, we want everyone working on that journey to understand that product documentation is just one piece of the whole content pie that makes a user successful in using a product. Gone are the days when an installation manual or administration guide is going to be the key to make a user successful. Now—especially in the cloud world—content impacts both buying *and* staying with a product. Whether it is the first automated email confirming the user's account was created or the sample application that helps the user understand how to code, all of the content along the journey influences the customer acquisition and retention.

How can we—the folks traditionally working on the post-sales, technical product content—make the user more successful and want to embrace our products? Why do they want to pay money to develop and host their application in the cloud? The simple answer is by ensuring they are getting something valuable out of it. And in that, content plays a key role.

Defining Our Learning Plan

The content team began working with in-app messages and emails—that "nurture" content—which is clearly an important part of the learning plan because that is the messaging that will ultimately link to the instructional learning content. The heart of the learning plan, however, is ensuring that you have the *right* learning content defined for each of the touchpoints along your user's journey.

Defining agreed-upon journey phases for your product can help you determine whether the right content is available to contribute to a successful outcome for each touchpoint. For example, if a user is in a phase of their journey where they are discovering or exploring, then providing content that helps the user learn why your product provides what they need can facilitate their success in moving on to the next journey phase. The goal of the customer is to solve their business problem as quickly and successfully as possible. We want our customers to not only embrace our product, but expand their implementation to gain more and more value from it—and eventually, perhaps even become a vocal advocate for it.

Deciding what content is required, where in the journey it will be needed, and in what format also helps in defining who should own creating the content, where it should be sourced, and where it should be published. With that in mind, let's revisit the term *content* again. Remember that we're including content in our user journey that might be created by a technical writer, a subject matter expert, a product manager, a marketing writer, or a support engineer. The important part is that we're providing the *right* content for the *right* journey phase.

Then, for every content asset in the learning plan, there are guidelines to define the format for that content and what to include in it. By defining templates and guidance for each content asset, we ensure consistency.

Finally, analytics keep us honest about whether our content is working, accessible in the right place, or is of good quality.

After our content assets are defined, it makes it much easier to create our nurture messages. Now, not only can we define clear calls to action in the messages, but we can also ensure that there is quality content available for our users to learn from.

What We've Learned

The key things we've learned from approaching content design and development through this learning plan are:

- Collaboration across the various content creation teams and with other product-team functions (like offering management, sometimes known as "product management" outside IBM) is critical to delivering a consistent end-to-end content journey
- Alignment between the learning plan and touchpoints with customers ensures consistent messaging that provides high-value content
- The learning plan provides a framework to define what content is needed, which phase of the journey that content asset bests supports, identify if templates and guidelines are needed to ensure consistency, and who owns creating the content asset
- Measuring the impact ensures that we keep our content–and our users—on track for success

While we can't share actual numbers, we have seen our registration and conversions rise since adopting this approach. Content fuels the client journey and a learning plan can help to enrich the user's experience with the product by providing that "right content" to enable the customer to learn and succeed.

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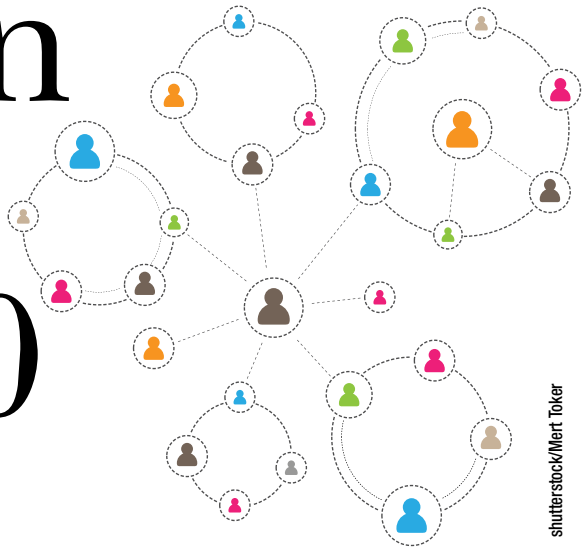
The Human Face of Content 4.0



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By JOE GOLLNER | *STC Member*
and JACK MOLISANI | *STC Fellow*

TWO YEARS AGO, Sridhar Ramaswamy, a senior vice president at Google, wrote:

> *Consumer behavior has changed forever. Today's battle for hearts, minds, and dollars is won (or lost) in micro-moments—intent-driven moments of decision-making and preference-shaping that occur throughout the entire consumer journey.*
>
> *Micro-moments occur when people reflexively turn to a device—increasingly a smartphone—to act on a need to learn something, do something, discover something, watch something, or buy something. We want things right, and we want things right away.*
>
> *The successful brands of tomorrow will be those that have a strategy for understanding and meeting consumers' needs in these micro-moments.*
>
> *(Source:* www.thinkwithgoogle.com/marketing-resources/micro-moments/how-micromoments-are-changing-rules/*)*

Two years can be an eternity in the technology world. In addition to accessing content via mobile devices, we now have voice-activated devices, the Internet of Things, and a new wave of digital transformation. Welcome to the era of Content 4.0.

The question we want to explore is what will it mean to be a technical communicator working in this brave new world. Put another way, what is the human face of Content 4.0 if indeed it has one?

Progressive Stages of Content Evolution

Let's start with some definitions. Content 4.0 loosely parallels Industry 4.0.

There are four stages in the evolution of manufacturing, starting with the industrial revolution in the late 18th century:

- **Industry 1.0** Refers to the days when steam power and mechanization was first applied to large-scale manufacturing.
- **Industry 2.0** Brings us to the early 20th century when electricity and the assembly line again revolutionized manufacturing.
- **Industry 3.0** Refers to the introduction of systematic automation to the manufacturing process in the later 20th century.

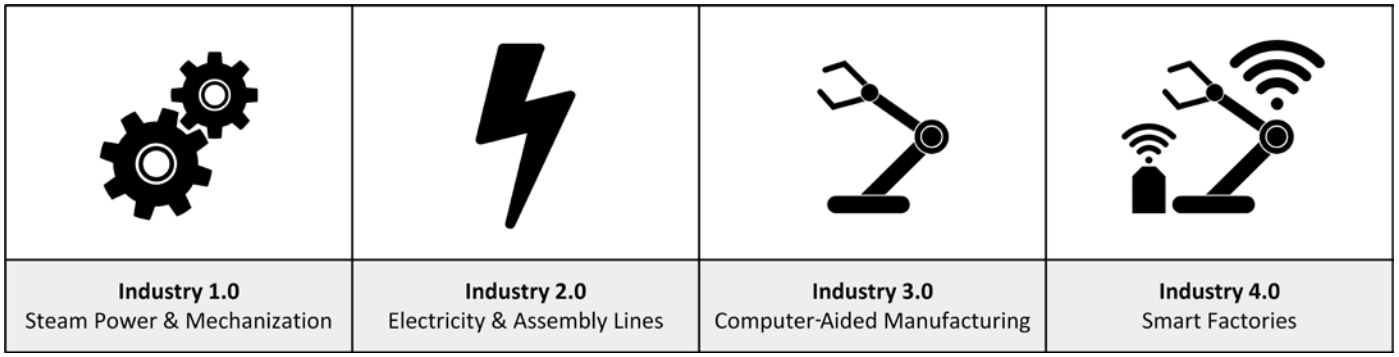

Figure 1. The Four Industrial Revolutions

- **Industry 4.0** Highlights the most recent trends in advanced automation, where manufacturing devices communicate with other devices and dynamically reconfigure to optimize production.

When we talk about Content 4.0, we are applying these same four phases to how we prepare, manage, and deliver content.

- **Content 1.0** Refers to the way that content has been prepared since the invention of the printing press—with no real distinction between the content and the medium on which it is delivered. At this level, "authors write books" you could say. The vast majority of content produced even today exists at this level.

- **Content 2.0** Represents a major step forward, where content is created and managed separately from the way in which it is formatted and delivered. The practice publishes multiple information products from a single managed source.

- **Content 3.0** Currently stands as the state-of-the-art practices of integrated content management, where content is digitally connected not only to its sources, but also to the workspace of subject matter experts (SMEs). In this way, content changes made by authors and SMEs are dynamically filtered and published to multiple information products.

- **Content 4.0** Looks ahead to the next generation of communication practices where content "objects" are created and shared with partners and customers. Content objects (like objects in object-oriented programming languages) contain not only data but also instructions for what can be *done* with the data, such as rules for how the content can be accessed or formatted.

The recipients of these content objects (as opposed to the author) combine and then publish content objects, producing totally new and unforeseen micro-moment information experiences.

Content 4.0 is in fact every bit as futuristic and abstract as it sounds. But what will it be like to be a technical communicator working with Content 4.0?

Phases of Technical Communication Work

One can apply these same four phases to the field of technical communication as a whole:

- **TechComm 1.0** Should be quite familiar. At this level, communicators perform the traditional role of preparing and publishing end-user documentation.

- **TechComm 2.0** Is where many communicators find themselves today. They author content that is structured and modular so that multiple publication formats can be produced from a single source: print, ePub, webhelp, online knowledge bases, embedded assistance, and so on.

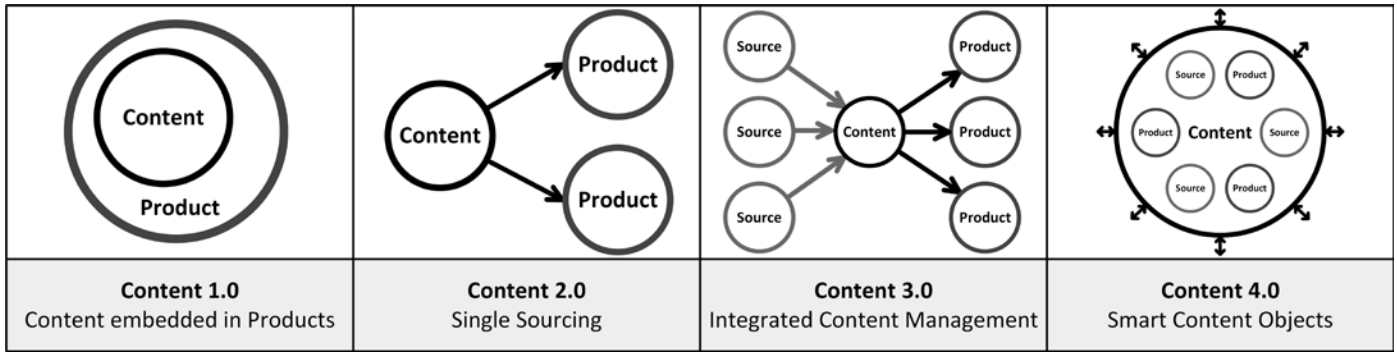

Figure 2. The Four Content Development Revolutions

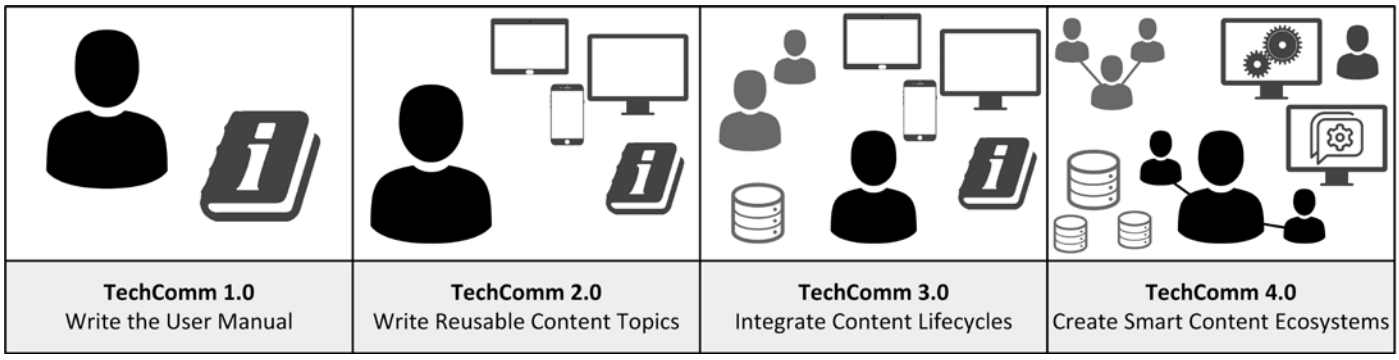

Figure 3. The Four Technical Communication Revolutions

- **TechComm 3.0** Is where the role of the technical communicator really starts to change. At this level, the communicator establishes and maintains digital, persistent, and fine-grained connections back to the original sources, including SME groups, for all information products so that changes flow dynamically. The communicator becomes a part of a team that designs, operates, and evolves an integrated content lifecycle.

- **TechComm 4.0** Represents a future state where the technical communicator will be part of a virtual team of specialists that design, operate, and evolve complex content ecosystems. As part of a virtual team, these communicators will become responsible for creating content objects, both the content and the associated behavior. The downstream publisher of these content objects will frequently be automated processes run by a customer to provide micro-moment information experiences, such as a chatbot or voice-activated product answering questions.

A picture begins to emerge of what it will feel like to be a technical communicator working on Content 4.0. It will be a more technically demanding activity than it is now, even if the communicator may not always be coding the application behaviors along with the content itself. It should be expected that many technical communicators will take on more and more of this "technical" work and that organizations will be interested in communicators who can cover both the technical and communication sides of the task.

One can also predict that the work of communicators will become even more collaborative than it is today. No one will really be completely proficient in all of the specialties that must be called upon to create a fully functional content object. The specialties include domain knowledge, user task awareness, user analytics, data visualization, videography, animation, and illustration. And let's not forget intelligent categorization for smart discovery, assembly, and rendition. So, communicators will always work as part of a team of specialists and, following the trends in the marketplace, these teams will almost always be virtual and distributed.

As with the trajectory that connects Industry 1.0 to Industry 4.0, and Content 1.0 to Content 4.0, we see a continuity that will connect technical communication at TechComm 1.0 to TechComm 4.0. It's not like we have been beamed to another planet—communicators *still* need to communicate. And even multi-directional communication, reaching forward to users and backward to subject matter experts, is not entirely new. What is new is the sheer number of communication pathways and players that will be involved and the technical sophistication and precision demanded of everyone who will be part of the larger content ecosystem.

What is new is the sheer number of communication pathways and players that will be involved and the technical sophistication and precision demanded of everyone…

In many ways, the human face of Content 4.0 is fully recognizable. It, in fact, has many faces as we can see the many people you will need to build relationships with in order to create, manage, and deliver the next generation of micro-moment information experiences. The scale and speed of the brave new world of Content 4.0 represents is a little daunting to be sure. But it is also exciting. We should look forward to "getting our hands dirty" with Content 4.0 because it is absolutely true that the strategic value of good communication skyrockets as we move toward this future.

If today you feel frustrated that the important work of technical communication is not fully appreciated by your organization, you can look forward to a time when that work becomes the one thing that is irreplaceably important in the next generation of smart products. This is true because at the end of the day, the smart content ecosystem and product lifecycle will sit idle if the communication pathways between customers, users, and product specialists come to a halt. And these pathways depend on people skilled in translating between specialties, perspectives, and interests. It depends on you.

So we set out to find the human face of Content 4.0. And what we found should be reassuring.

We have found our own reflection smiling back at us.

JOE GOLLNER *is the Managing Director of Gnostyx Research Inc., an independent consultancy that helps organizations acquire, manage, and leverage digital content technologies (*www.gnostyx.com*). A veteran implementer, he has overseen dozens of content management projects in a variety of industries and in organizations ranging in size from start-up ventures to global enterprises. A graduate of the University of Oxford (Masters of Philosophy), he blogs as the Content Philosopher (*www.gollner.ca*) and is still working on a book about the effective and sustainable management of content and content technologies.*

JACK MOLISANI *is the President of ProSpring Technical Staffing, an employment agency specializing in technical writers and other content professionals:* http://ProspringStaffing.com. *He's the author of* Be the Captain of Your Career: A New Approach to Career Planning and Advancement, *which hit #5 on Amazon's Career and Résumé Best Seller list. Jack also produces the LavaCon Conference on Content Strategy and TechComm Management (*http://lavacon.org*), which will be in Portland this November.*

What the Fox Says:
STC Quarterly President's Report

WE'RE A FEW MONTHS into the 2017–2018 board year and into working with our new CEO, Liz Pohland, and I couldn't be more thrilled at the progress STC is making.

Membership Year Now Open!

STC's 2018 membership season is now open! To celebrate STC's 65th anniversary, we're bringing you reduced rates on the Professional & Academic (formerly known as Classic) and Student memberships. Go to *https://www.stc.org/membership/* to join or renew today.

New Initiatives

We have created a few new groups this year to support STC's mission of demonstrating technical communicators' economic value, fostering opportunities for success in today's workforce, and offering continuous education.

Women in Tech Comm SIG

Just in time for membership opening, we've created a new Special Interest Group to identify opportunities for, advocate for, and discuss current issues for women in technology. All genders are welcome.

Business Value of Tech Comm Task Force

As I mentioned in my address to the membership when I was installed as STC President, business innovation is happening at a rapid pace today. In the midst of that change, businesses must think differently about information and how people consume content. Our role in solving our customers' problems is essential to business success. To that end, we have formed a Business Value of Tech Comm Task Force that will do the following:

- research how technical communicators are used in different industries.
- build a model for assessing the value of content in those industries.
- identify opportunities to link tech comm to current issues.

We're looking forward to hearing more about the strategic plan the task force develops for STC to continue to promote the business value of tech comm. In the meantime, this special issue of *Intercom* on this very topic, guest edited by Andrea Ames, is a great start.

Academic Outreach Task Force

In an effort to develop new and renewed relationships with leaders of tech comm programs at our colleges and universities, we've created an Academic Outreach Task Force. We hope to leverage the relationships we have with our current academic champions to see what's working and what's not, and then formalize and publicize programs that support heads of academic programs in sponsoring STC student chapters.

STC's 65th Anniversary

As mentioned above, this year is STC's 65th anniversary! I'm looking forward to celebrating the achievements of both STC and its members all year long and right into the 2018 Summit in Orlando. Keep an eye out for more information on this.

2018 Summit Call for Proposals Now Open

The theme for the 2018 STC Summit in Orlando is Communicate the Future. While there, we'll learn, network, and share information about how technical communicators have always communicated the future to their audiences. The call for proposals is now open: *https://summit.stc.org/call-for-proposals/*. If you have knowledge to share about how we work, where we work, or you at work in the future, consider submitting a proposal to speak and share your ideas.

The road ahead looks promising, but we simply couldn't have gotten to this point without all of you. What you are doing for STC and for technical communication is valuable—thank you. I can't wait to see what the rest of the journey brings us this year—so let's work hard, change lives, and have fun!

2018 Membership Season Now Open

STC IS TURNING 65, and we want you to be a part of our celebration! STC is passing on exclusive discounts and promotions that are only available to members!

We're excited to tell you that we have added new benefits for increased value by reducing dues rates in the Professional & Academic (formerly known as Classic) and Student membership categories.

Here are some additional benefits that we have recently added:

- New asynchronous online education courses, which let you work through course material at your own pace, over a set time period.
- New Salary Database that will be available to 2018 members only.
- New Member Perks companies with Deluxe and Office Depot, offering substantial discounts to our U.S. and Canadian members.
- New STC Women in Tech Comm Special Interest Group, sponsored by Adobe. This SIG will be a space where the tech comm community can discuss and share current issues and opportunities related to women in technology and technical communication. Adobe is sponsoring the first 300 SIG members for free. All members are welcome.

New for 2018	Rates	2017	Rates
Professional & Academic	$199	Classic	~~$225~~
New Professional	$160	New TC Professional	$160
Student	$65	Student	~~$75~~
Retired	$145	Retired	$145
Gold	$395	Gold Value Package	$395

Enjoy the same great benefits you always have, plus brand new benefits (and more to come), all at a reduced price for Professional & Academic and Student members. Questions? Contact *membership@stc.org* or call + 1 (703) 522-4114.

Reminder of Deadlines for Awards and Honors

THE DEADLINES FOR nominations for many of STC's awards and honors are upcoming. Please see the STC website, *www.stc.org*, for more information or to find out how to nominate someone.

- Associate Fellow Recommendations: Due 1 November 2017
- Fellow Nominations: Due 1 November 2017
- Sigma Tau Chi and Alpha Sigma Honors Societies: Due 2 October 2017
- Jay R. Gould Award for Excellence in Teaching Technical Communication: Due 2 October 2017
- Ken Rainey Award for Excellence in Research: Due 3 November 2017
- Distinguished Community Service Awards: Due 30 October 2017
- Community Achievement Awards: Due 29 January 2018
- Community Pacesetter Awards: Due 23 February 2018

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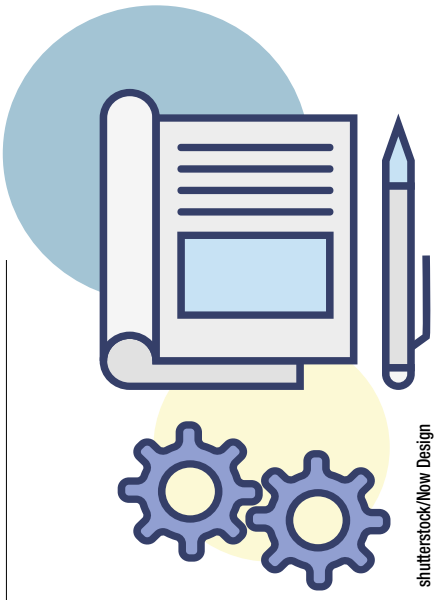
It's All About the Reader: How to Implement Care Ethics in Your Company Style Guide



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BY DANIELLE L. KARR | *Guest Columnist*

JANE IS a senior technical and professional writer who has recently faced many questions and challenges when crafting a variety of documents for her company. These have included ethical dilemmas and considerations when she is trying to create consistently clear, well-written, and principled materials—whether it is a technical manual, advertisement, blog post, or promotional email. She wants to balance her company's needs with her consumers' needs, but finds that she is often at a loss for words when she tries to defend her care-centric decisions to internal stakeholders.

Jane decides to solve this problem by building into her company style guide an ethical model to follow as a moral foundation for all company documents. This will not only give her power and language to defend her decisions, it will also help other writers in her company be on the same page ethically. However, she finds herself having a hard time choosing which ethical model to follow, knowing that whichever style she chooses has the potential to change the outcome of any ethical-choice situation. In this column I will propose to Jane, and all of you, an often overlooked—yet extremely applicable—approach to ethical business writing: ethics of care.

Implementing ethics of care (care ethics) as a style guide foundation supports other important writing standards like clarity, accuracy, interest, etc. Instead of forcing Jane to write in the company's common utilitarian rhetoric (the ends justify the means), care ethics allows her to focus on the needs of the individuals the copy will affect most—the consumers. I have woven the principles of care ethics into my own company's style guide, helping writers in my company place the customers' needs at the heart of any communication's intentions, and I draw from my own experiences here.

The Origin of Care Ethics

Care ethics is a normative ethical theory developed by feminists in the 1980s to explain the differences men and women often display when it comes to moral dilemmas. According to Carol Gilligan, an early theorist of care ethics, society functions on two types of moral voices: one that is masculine and one that is feminine. The masculine voice views things as logical and focuses on the individual—that moral decisions should be based on justice. The feminine voice protects interpersonal relationships and the need to take care of others. While her methods and approaches have been criticized, and rightly so, Gilligan's work cultivated the idea of care ethic principles, especially the method I explore here.

This feminine voice is the foundation of care ethics and asserts that concern for those around us allows people to make decisions that will most likely benefit everyone involved; that those most affected by a decision will have their needs and vulnerabilities weighed more heavily. The theory about the masculine and feminine voice is also not always attached to biological gender; care ethics is rather a moral approach to satisfy the emotional and psychological needs for both men and women.

The Ethics of Caring for Readers

Gilligan submits that most people are caring individuals who develop personal relationships with others and, in turn, want to be cared about. Scholar Joan Tronto's four principles of care ethics (attentiveness, responsibility, competence, and responsiveness), derived from Gilligan's work, are normally found in proximity-based relationships, so this gives writers the unique challenge of relaying an attitude of care to their readers—people they do not personally know. However, writers can apply these principles by being attentive to readers' needs, acknowledging the responsibility they have to care for them, being competent in their craft, and then doing due diligence to see if the care receivers' (readers') needs are satisfactorily met.

For example, Jane has now crafted her new style guide

This column features ethics scenarios and issues that may affect technical communicators in the many aspects of their jobs. If you have a possible solution to a scenario, your own case, or feedback in general, please contact column editor Derek G. Ross at *derek.ross@auburn.edu*.

Editorial Note

MANY OF US SPEND our days writing and revising a variety of documents. From memos and emails to instructions, many of us also depend on an in-house style guide for consistency across our organizations' many moving parts. In this month's column, Danielle Karr suggests a revision strategy for those style guides based on the concept of care ethics. By reworking the fundamental writing guides to our businesses, the hope is that we become more attentive to our clients' needs.

In our last column, Dan Richards called our attention to problems of agency in visual risk communication. R. Bailey wrote us with valuable feedback that we hope helps you continue to work through the issues Dr. Richards brought to our attention. He wrote:

The question of bifurcating tools between expert versus lay-people is something we, too, have grappled with. However, it is important to keep in mind that just because someone is a Subject Matter Expert, does not necessarily make them an expert in using the interactive tool—especially a publicly accessible website that requires no training before use. Although careful design can go a long way to preventing user error, it is not a panacea. For example, designing for greater ease of use can also lead to greater likelihood of error. A stray mouse-click, an errant parameter (e.g., "11.0" when "1.10" was intended), or an overlooked input setting can dramatically change a visualization, but it may not be evident to the user that a mistake has been made. This raises an interesting question—which is riskier, a subject matter expert who does not know how to operate the tool or a savvy tool user, who lacks subject matter expertise? You could easily argue that the SME can pose greater risk because an expert likely has greater influence and impact.

While I also like the idea of creating scenario-based applications of the tool, this carries risk of its own. Scenarios are typically more complex and error-prone than merely displaying data because they rely upon built-in assumptions. You could easily invoke a false sense of fear (or security) by using hypothetical scenarios, which are fraught with variability and unpredictability. For example, you could lead users to make a conclusion like "the map says my home is safe from a category 3 hurricane," which is a more dubious conclusion than "the map says my home is safe from an 8-foot water rise."

These are not offered as reasons to avoid pragmatic approaches to tool use—in fact, we have instituted similar strategies of limiting tool access to SMEs in our work – but to point out that sometimes building in more process and layers of complexity in the name of risk mitigation, can have the adverse effect of introducing new risks, which may exceed the original risk of a more basic tool.

Ultimately, I side with the author that we need to be considering and debating the risk of granting access and agency to our users. For the technical communicator, I advocate that we use our skills and expertise to promote clarity and understanding wherever possible.

For example, what more can be done to:

- clarify the appropriate uses and limitations of the tools?
- configure the user interfaces to clearly indicate the specific settings selected by the user and any warnings that may go with it?
- explain the underlying science and data?
- direct users to find more information pertinent to their concerns (e.g., published research on flood risk, flood insurance, FEMA)?

Thank you for the engaging article.

As always, we welcome your responses, and truly enjoying working with the ideas you bring to our attention. Let us know your answers to the questions we've posed, your thoughts on our roles as technical communicators in general, or send us your own ethics cases or column ideas. Please send your responses to derek.ross@auburn.edu. *Responses will be printed in an upcoming issue of* Intercom *as space permits.*

—Derek G. Ross

that is founded in care ethics. If she then writes a product manual that, when read by the audience, does not meet the customers' needs, she will listen and respond by creating a new manual based on the feedback given. Future customers will then have a better experience with the manual because their need for clarity has been met. This will affect both how they feel about the product (influencing their future purchasing decisions) and how they talk with others about the company. By Jane applying care ethics to her manual, she creates a ripple effect that not only benefits the customer, but also the growth and reputation of the company and its employees.

Applying Care Ethics

The following are some ways I've employed the principles of care ethics in my company's style guide, shifting the company's perspective from simply caring *about* our readers to caring *for* our readers. Note that these suggestions go beyond the fundamentals of most company style guides, but they are important in helping a company develop an overall ethical writing style.

Audience-centered Standards

It is always important to make sure the language in a style guide puts the

customer before the company, helping to safeguard that documents are not too technical or too distant to the reader. This enables writers to check and make sure their article, advertisement, or manual is not misleading in any way. I express these editorial standards in my company style guide by including language such as, "Be respectful of our customers' time. Always be sure to not bombard them with information they do not need to know or questions we don't need to ask." to convey the importance of thinking of the readers' needs first.

I also communicate the importance of keeping the vulnerabilities of our readers in mind through language in our style guide, such as, "Keeping [the language] simple also helps ensure the language is clear and helpful—not misleading or misguiding in any way. If you are having to make the language complex to get around an issue, then the core of the message should be revisited." This approach allows writers in my company to check their work and make sure they are not burdening their readers with unnecessary information or questions, that the documents they are creating have value for the readers, and that there is no misleading information being relayed to the customer. Incorporating language like this into a company's style guide communicates to all the writers in the company an attitude of caring for customers that will—ideally—translate into the documents themselves.

Third-person Singular "They"

The third-person singular "they" is a controversy within the editorial world. I'm sure everyone reading this column has their own passionate opinion of whether or not it is acceptable to use singular "they" in professional writing, and style manuals such as Chicago and AP each have their own (contradicting) stance. Possibly the strongest argument for the usage comes from a more modern moral dilemma. When we apply care ethics to our approach to writing, we can see that "he or she" is limiting and excludes the group of people who are either gender neutral or prefer to not have their gender assumed or bucketed into one of only two categories. Some readers may be uninfluenced by gendered language, but others will make entire purchasing decisions based on the inclusiveness of the language they are presented; so, why not just avoid the issue?

In order to solve all these problems and create more inclusive company language, it makes sense to standardize the usage of third-person singular "they" in a company style guide—as I have done for my company. Care ethics can be easily seen in this decision because one of the main points of care ethics is the importance of meeting the care receivers' (readers') needs. Because we as writers may know our general audience but do not know every single person who will be interacting with our documents, it is a good practice to write in a way that is inclusive of the largest group possible within our audience. Using gender-neutral language is a great way to express care for all the possible readers of a document.

Data-driven Writing

Another way to implement care ethics in digital copy especially is to standardize data analysis within the company. Standard A/B tests and focus groups allow for different language and approaches to be explored and evaluated—helping fulfill Tronto's fourth principle, *responsiveness*, in our writings. Applying a standard in the style guide to survey customers about their experience with digital materials is another way to implement *responsiveness* and allows writers to obtain insight into how the readers respond to the information they receive. For example, my company style guide includes a section on surveys, especially NPS (Net Promotor Score) surveys, that explains how surveys help us be responsive to our customers and not assume anything about their experience or needs.

Gathering this information helps us tailor our future documents to better meet the needs of the readers. It gives us the opportunity to respond and correct anything in our materials that is not properly taking care of customers. By keeping open channels of communication with our customers through testing digital and print materials, as well as constantly requesting and reviewing feedback, we are able to hear and measure their response to us as care givers. This allows us to refine our decisions and better satisfy our customers.

Bringing It All Together

These three examples of implementing care ethics in a company style guide each help create a more inclusive customer experience. The takeaway in this column is that the most important thing Jane can do to promote ethical materials in her company is to implement an overall brand editorial standard that embodies care ethics principles. With this lens in place, she and other writers can check to make sure their documents are caring rather than technical, helpful rather than complicated, respectful rather than inconsiderate, and truly putting the customers first in all company communications.

DANIELLE KARR *is a Senior Copywriter at one of the largest smart home companies in the United States. She graduated with a Bachelor's degree in communications and a minor in English, interned at one of the largest advertising agencies in New York, and recently received a Master's in technical communication from Utah State University. She has been previously published in* Intercom *as well as Distance Learning.*

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Accessible Text Labels

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BY TOSHIBA BURNS-JOHNSON | *Guest Columnist*

A NEW WEB APPLICATION has gone viral! You're excited to check it out. Before you can get started, you're required to set up a profile.

You open your profile page, and you encounter the following input field:

There is no label or instruction text so you skip the field. The following message is displayed: "This is a required field."

You try entering your name, email address, and telephone number to no avail. You keep getting the following message: "The value is invalid."

Your enthusiasm is waning; however, you persist. You try a few more possible values. Then you review the help for the application. You're frustrated because the help is not helpful. You're debating between contacting technical support and abandoning the application.

This is an extreme scenario for sighted users. However, this scenario is all-too-common for visually impaired users who rely on screen readers to navigate applications.

Overview

Sighted users can often use visual indicators to determine the purpose of an HTML object. These users cannot access these visual cues. Therefore, screen reader users often rely on accessible text labels to determine an object's purpose.

Oftentimes, text labels are missing, are not programmatically associated with HTML objects, or are too vague to be helpful. The absence of accessible text labels causes undue frustration and unnecessary barriers for screen reader users.

The Web Accessibility Initiative–Accessible Rich Internet Application (WAI-ARIA) specification provides a simple solution! You can keep your current visual design, and use the aria-label property and the aria-labelledby property to provide accessible text labels.

You can use these properties to label any HTML object, including links, buttons, form fields, divs, and landmark regions. When a screen reader encounters an HTML object that uses one of these properties, announces the corresponding text as the object's name. If an HTML object uses both properties, the screen reader announces the labels that the aria-labelledby property references.

This column shares information about accessibility requirements and techniques, and introduces standards and policies that might affect your products. If you have feedback, contact Linda Roberts at *lerober1@yahoo.com* or Lisa Cook at *Lisa.Cook@sas.com.*

aria-label Property

Use the aria-label property to provide an invisible text label for an HTML object when a visible label is unnecessary or would negatively impact your design.

With the aria-label property, you can specify only one label.

When a screen reader encounters the following button, the screen reader announces "X button":

```
<button onclick="function
()">X</button>
```

Screen reader users might ask: "What does the X button do?" To make this button accessible for screen reader users, specify "Delete" for the aria-label property.

```
<button aria-label=
"Delete" onclick="function
()">X</button>
```

Now, the screen reader announces "Delete button" when it encounters the button.

You can use the aria-label property in many situations, including the following:

- Provide an accessible label for image-only buttons, such as ↻.
- Clarify the purpose of non-descriptive link text, such as "Read more."
- Differentiate landmark regions that have the same role, such as a primary and a secondary navigation.
- Provide a hidden label for input fields when a visible label is redundant. A common example is the Search field.

aria-labelledby Property

Use the aria-labelledby property to programmatically associate an HTML object with one or more text labels that are already visible on screen. With the aria-labelledby property, you provide the IDs of the HTML objects that contain the labels.

In the following example, the label "Email Address" is visible on screen. The aria-labelledby property associates the "Email Address" label with the input field. In this case, the screen reader announces "Email Address edit" when it encounters the input field.

```
<th scope="col" id=
"email">Email Address</th>

<th scope="row"
id="allison">Allison
Perry</th>
<td><input type="text"
name="email _ 1" aria-label
ledby="email"></td>
```

A screen reader user might ask: "Edit the email address for whom?"

The person's name is also visible on-screen so sighted users can easily identify whose email address they are editing. To make this input field more accessible for screen reader users, add the person's name to the label.

```
<td><input type="text"
name="email _ 1" aria-label
ledby="allison email">
</td>
```

Now, the screen reader announces "Allison Perry Email Address edit" when it encounters the input field.

You can use the aria-labelledby property in many situations, including the following:

- Associate multiple, visible labels with an HTML object.
- Associate a cascading menu with its parent menu.
- Provide a label for a group of items, such as a list of radio buttons.
- Clarify the purpose of a landmark region.

Tips for Creating ARIA Labels

Use clear labels

- Describe the action that the HTML object enables a user to perform. For example, use the label "Delete" not "Trash can" for the following image-only button: 🗑.
- Avoid vague labels. For example, use the label "Click here to learn about ARIA labels" instead of "Click here".
- Provide a label in addition to placeholder text for input fields. The placeholder text is no longer accessible after a user enters a value.

Be succinct

- Do not include the object's type or role in its label because that information is redundant. For example, when a screen reader encounters the following button, the screen reader announces "Refresh button":

```
<button id="refresh"
aria-label="Refresh">...
insert_image...</button>
```

If you use the following label, the screen reader announces "Refresh button button":

```
<button id="refresh"
aria-label="Refresh
button">...
insert _ image...</button>
```

- Do not provide labels for decorative images. In the following image, the text "Errors" is the label for the error icon: ⊗ Errors. If you provide the label "Errors" for the icon, the screen reader announces "Errors graphic Errors".

Be consistent

Use the same label for an HTML object in the user interface and in the supporting documentation. Otherwise, screen reader users will have difficulty finding that object in the user interface or finding information about that object in the documentation.

Consider all users

If a label is helpful for both sighted users and screen reader users, provide a visible label in addition to the hidden text label. For example, sighted users might be unfamiliar with the following image-only button: 🔧. In this case, the aria-label text "Manage variables" is useful for all users. Thus, you could also specify this text for the title attribute. The text in the title attribute is displayed in a tooltip when users hover over the button.

```
<button id="refresh"
aria-label="Manage
variables" title="Manage
variables">...insert_
image...</button>
```

TOSHIBA BURNS JOHNSON *is a Technical Writer at SAS. She has extensive experience in thea reas of user-interface design, uasability, and accessibility. She helps bridge the communication gap that exists between users and developers, and she advocates for design changes that improve the user experience.*

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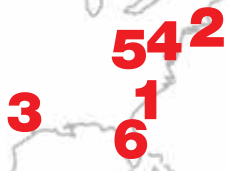

F.Y.I. lists information about nonprofit ventures only. Please send information to *intercom@stc.org.*

1 5-7 Oct
The **Council for Programs in Technical and Scientific Communication** (CPTSC) will hold its 2017 Annual Meeting, with a conference theme of User-centered Program Design, at the Georgia Conference Center in Savannah, GA.
CPTSC
http://www.cptsc.org/annual.html
conference2017@cptsc.org

2 8-10 Oct
The **Public Relations Society of America** will hold its 2017 International Conference 8-10 October at the Boston Marriott Copley Place in Boston, MA.
PRSA
(212) 460-1400

3 9-13 Oct
The **Human Factors and Ergonomics Society** (HFES) annual meeting, HFES 2017, will take place 9-13 October at the JW Marriot in Austin, TX.
HFES
https://www.hfes.org/web/HFESMeetings/2017annual-meeting.html

4 25-28 Oct
The **American Translators Association** (ATA) will hold its 58th Annual Conference 25-28 October at the Washington Hilton in Washington, DC.
ATA
https://www.atanet.org/conf/2017/
ata@atanet.org

5 27 Oct-1 Nov
The **Association for Information Science and Technology** (ASIS&T) will hold its 80th Annual Meeting 27 October-1 November at the Crystal City Hyatt in Arlington, VA.
ASIS&T
meetings@asist.org
(301) 495-0900

6 1-4 Nov
The **American Medical Writers Association** (AMWA) will hold its 2017 Medical Writing & Communication Conference 1-4 November at the Walt Disney World Swan and Dolphin Resort in Orlando, FL.
AMWA
conference@amwa.org
(240) 238-0940

Proud to Be a Fed

BY LINDA OESTREICH | *STC Fellow*

I HAVE BEEN WORKING for more than 50 years … and in some ways, I have come full circle. When I was fresh out of high school in the San Diego, CA area, I took the Federal civil service exam. A few months later, I was hired as a GS-2 clerk-typist whose main job was typing requests for planes that were flying in the Vietnam War. After working for more than 20 years for the Feds, I left civil service as a GS-12 Supervisory Technical Writer/Editor to work in industry. I spent the next 15 years working in tech comm in and around Houston, TX, only to find that I missed San Diego and wanted to return.

My first job back in my hometown was as a tech doc manager with what is now Hewlett Packard Enterprise. About five years later, I took a job as a contract writer supporting—you guessed it—the Feds. Five years after that, I was reinstated as a Federal worker—this time as a GS-13 right back at the same command where I had worked most of those beginning 20 years. That command is the Space and Naval Warfare Systems Command (SPAWAR). We support the warfighter with information systems, cyber security, and many other systems our fighting sailors need to outfit their ships related to command, control, communications, intelligence, surveillance, and reconnaissance. We have a total employee base of about 10,000—1,000 here at headquarters where I work, 4,500 at a second San Diego location, and another 4,500 in Charleston, SC. We also have employees in New Orleans, LA; Washington, DC; Kailui, HI; and other spots around the world.

My specific job is no longer strictly tech comm. My official title is Project Manager for Leadership and Talent Development. My work entails a lot of logistics. I help write proposals for training vendors, help select those vendors, and then make or oversee all the arrangements to ensure the training happens. Those arrangements encompass everything from registering students to ensuring flip charts are in the rooms—if we can find an open room! I also am one of the coordinators for various leadership programs our top executives attend in Washington, DC, or at the Naval Postgraduate School in Monterey, CA. We have several other leadership events that I run or coordinate—our mentoring program, our internal leadership program for mid-career professionals, and even basic Microsoft classes in Excel, PowerPoint, and Project.

What I have found these days, despite the political divisions around the country, is that I am proud to be working for our warfighters. What I do is far removed from those who are keeping our country safe, but when I facilitate training to the executives who develop ideas and imagine innovative ways to make our service members safer and wiser, I realize that what I do is important. It's interesting to work in a place that doesn't pay dividends to shareholders and isn't focused on next quarter's earnings. Here, we pay attention to the overall working climate and how well our customers (the fleet) believe we are doing. Our working climate is tough. We work in what was once a huge aircraft factory built in 1940. It is cold, dirty, and too difficult to change into something that is commensurate with a regular office building. Finding money for all that needs to be done is difficult—our taxpayers insist on using money for other things! Although we provide high-end technological solutions to our warfighters and to the fleet that supports them, our own infrastructure is old. We also have limitations on the types of software we can use, and we're always several versions behind what is being used "outside."

Each of us who works in the Federal Government takes an oath of office to support and defend the Constitution. That oath makes it OK that I don't have the best office, the best view, or a salary commensurate with my peers on the outside. Yet, I'm fully convinced that I'm part of what makes this country great. Not great again … but great today, yesterday, and always.

SPAWAR 1942

Linda is a well-known trainer and speaker in the world of technical communication. The topics she presents include leadership, career management, writing and editing, information design, creativity, ethics, and mind-mapping. She is an STC Fellow, former Society President, and presenter/instructor for STC. She currently works for the Space and Naval Warfare Systems Command Headquarters in San Diego as a training specialist. Linda holds a BA in English from UCSD, minoring in creative writing and scientific perspectives, and she has a certificate in Project Management from Rice University.

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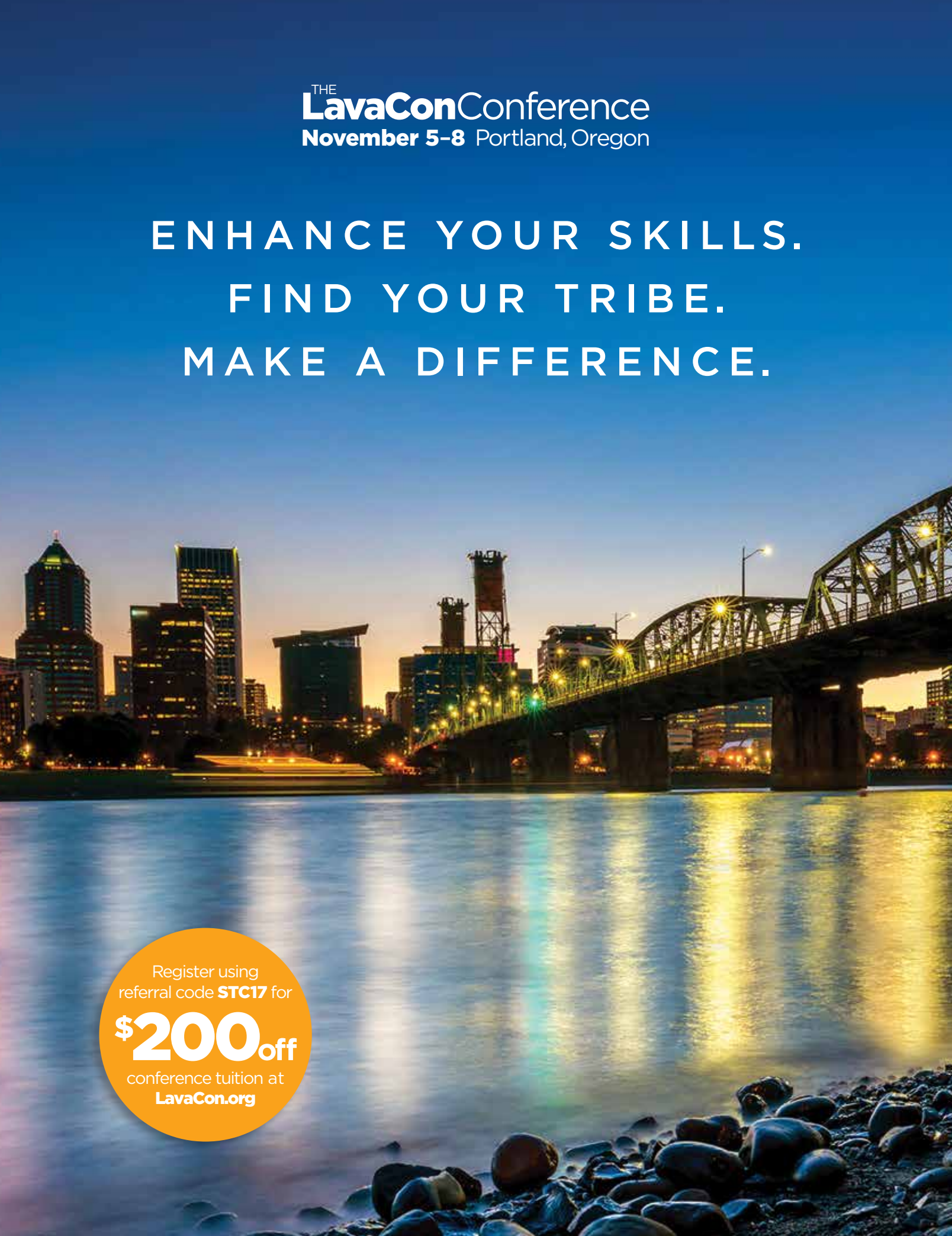
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